

Job Aid: How to Create an RPA Release Enabled Requisition

This Job Aid shows how to:

- Create an RPA Release Enabled Requisition in COMMBUYS
- Convert RPA Release Enabled Requisition to a Release Purchase Order

Of Special Note:

A Request for Payment Authorization (RPA) Release is a document in COMMBUYS used to document a contract purchase that has taken place or to request funds for a product that has already been purchased, or services that have already been provided. Once approved, the RPA Release Requisition creates a Release PO associated with a Master Blanket Purchase Order (MBPO), which is a COMMBUYS document used to create ordering catalogs for contracts including Statewide Contracts.

To use this functionality the MBPO must be designated RPA Release enabled. Before beginning the requisition, access the MBPO's General tab and verify the RPA Release Enabled field displays a Yes.

Screenshot

Directions

Step 1: Launch COMMBUYS

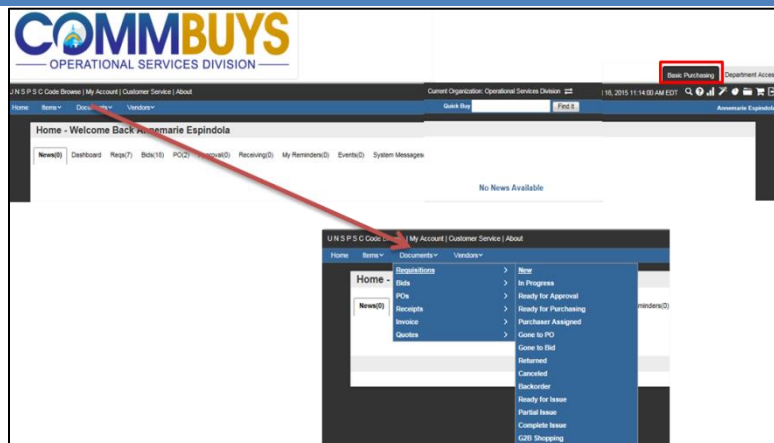
1. Launch the COMMBUYS website by entering the [URL](https://www.commbuys.com/bso) <https://www.commbuys.com/bso> in the browser.
2. Enter your login credentials and click the **Login** button on the COMMBUYS home page.



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How to Create an RPA Release Enabled Requisition

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Directions

Step 3: Start a new Requisition

1. From the Navigation Bar, select **Documents > Requisitions > New**

New Requisition

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

Department*: OSD01 - Operational Services Division

Location*: OSDTR - Training, Events & Outreach

Required By Date:

Requisition Type: RPA Release

Requestor: Annemarie Espindola

Contact: Annemarie Espindola

Alternate ID:

Estimated Cost: \$0.00

Print Format: Requisition Print

Special Instructions:

Step 4: Enter data in General tab

The General Tab for the requisition opens. On the left side of the screen, complete the following fields:

- **Department:** defaults from user profile. May be changed using the dropdown menu if other departments are available to user.
- **Location:** defaults from user profile. May be changed using the dropdown menu if other locations are available to user.
- **Required by date:** optional
- **Requisition Type:** RPA Release
- **Requestor:** user that created the requisition; this field cannot be edited.
- **Contact:** contact person for this requisition

Job Aid:

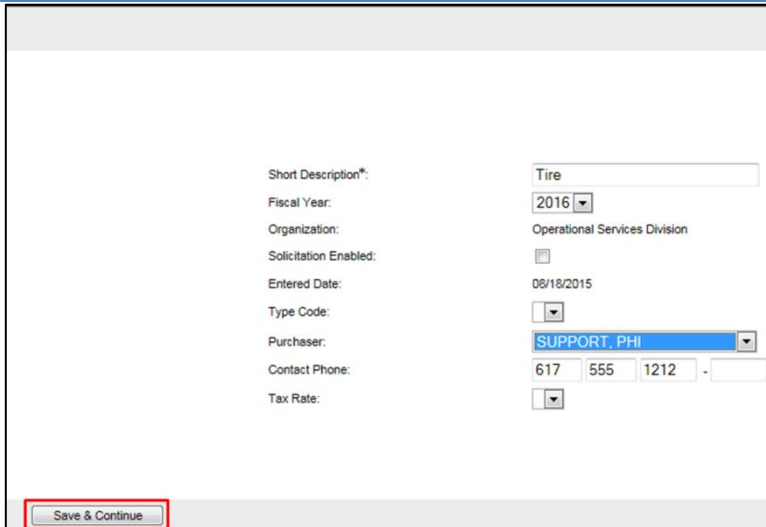
How to Create an RPA Release Enabled Requisition

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Step 5: Enter data in General tab (Continued)

1. On the right side of the screen, complete the following fields:
 - **Short Description:** be specific as this field is also used as search criteria to locate a requisition; may use any Departmental Identifier numbers. This field has a limit of sixty characters.
 - **Fiscal Year:** defaults to the current fiscal year.
 - **Organization:** default value based on your user profile and can only be changed by an administrator.
 - **Solicitation Enabled:** leave unchecked
 - **Entered Date:** defaults to current date.
 - **Type Code:** type options are based upon the requisition type. Leave blank.
 - **Purchaser:** defaults to your name; use the dropdown menu to select a different purchaser.
 - **Contact Phone:** defaults to the profile value; can be updated as needed.
 - **Tax Rate:** n/a for Commonwealth. Click **Save & Continue**.
2. Select the **Items** tab.



Short Description*:

Fiscal Year:

Organization:

Solicitation Enabled: ☐

Entered Date:

Type Code:

Purchaser:

Contact Phone:

Tax Rate:

Save & Continue



How to Create an RPA Release Enabled Requisition

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RPA Release Requirement RQ-16-1080-OSD01-OSDTR-00000025708 - Search Items

Search Using: Find It

Advanced Search [v]

Search Using: **ALL of the criteria** [v]

Search Fields:

- Item Description:
- Vendor Name: Goodyear
- Item Type: [v]
- UNSPSC Segment-Family: [v]
- UNSPSC Class: [v]
- Commodity-EPP: [v]
- Favorites: ☐

Cooperative Purchasing ☐

Result Type: Item [v]

Find It Clear

Search By	Filter	Quantity	Description	Est Date	Alt#	Trade Name	Expanded Fields	Revised?	Mark Revised?	Start	
Any Price • \$0.00-\$20.00 • \$0.00-\$99.99 • \$0.00-\$1,000.00	[x] 0 0	0	Ten Goodrich Auto Radial Size 24XW16R BSW SL EAGLE SPORT A/S 18P/L, Priced Code: 0000000	01-01-08	Ex	Each	The Goodrich Tire & Rubber Company	25-07 Transportation components and supplies 25-70 Tires and tire tubes	0.00%	PO IS VHS (EXPLODED) REVISION: 1	Yes
Any Vendor • The Goodrich Tire & Rubber Company (GTS)	[x] 0 1	0	Ten Goodrich Auto Radial Size 24XW16R BSW SL EAGLE SPORT A/S 18P/L, Priced Code: 0000000	01-01-08	Ex	Each	The Goodrich Tire & Rubber Company	25-07 Transportation components and supplies 25-70 Tires and tire tubes	0.00%	PO IS VHS (EXPLODED) REVISION: 1	Yes

Add to Req & Exit Add to Req & Next Page Cancel & Exit

1. The **Items** tab opens.
2. Click the **Search Items** button to begin the process of adding items to the requisition.
3. Click on the **Advanced Search + sign**

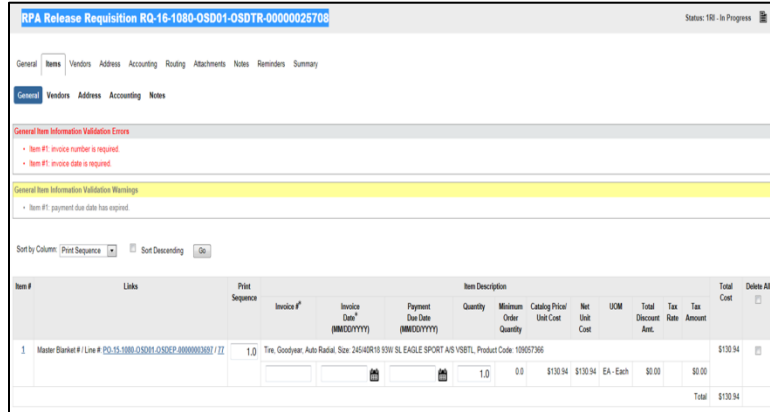
1. Using the **Advanced Search**, enter search criteria to find a good or service
2. Click **Find It**
3. Check the box in the **Select** column next to the item(s) and input the quantity for that item in the **Quantity** column.
4. Click the **Add to Req & Exit** button to return to the **Items** tab

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RPA Release Requisition RQ-16-1080-OSD01-OSDTR-00000025708 Status: 100 - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

General Item Information Validation Errors

- Item #1: Invoice number is required.
- Item #1: Invoice date is required.

General Item Information Validation Warnings

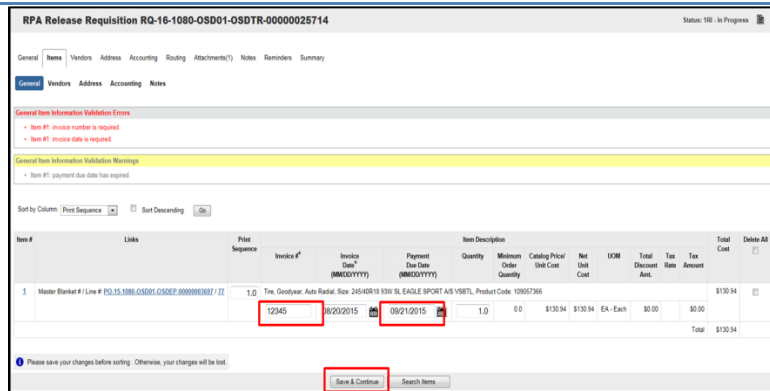
- Item #1: Payment due date has expired.

Sort by Column Print Sequence Sort Descending

Item #	Links	Print Sequence	Invoice #	Invoice Date (MM/DD/YYYY)	Payment Due Date (MM/DD/YYYY)	Item Description	Quantity	Minimum Order Quantity	Catalog Price/Unit Cost	Net Unit Cost	UCM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	Master Blanket # / Line # PO-16-1080-OSD01-OSDTR-00000025708 / 1Z	1.0	Tire, Goodyear, Auto Radial, Size 245/40R19 93W SL EAGLE SPORT A/S VSBTL, Product Code: 10957366				1.0	0.0	\$130.94	\$130.94	EA-Each	\$0.00	\$0.00	\$130.94		
Total															\$130.94	

Step 8: Review validation errors

- You will receive two Validation Errors that need to be corrected:
 - Invoice number is required
 - Payment due date is required



RPA Release Requisition RQ-16-1080-OSD01-OSDTR-00000025714 Status: 100 - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

General Item Information Validation Errors

- Item #1: Invoice number is required.
- Item #1: Invoice date is required.

General Item Information Validation Warnings

- Item #1: Payment due date has expired.

Sort by Column Print Sequence Sort Descending

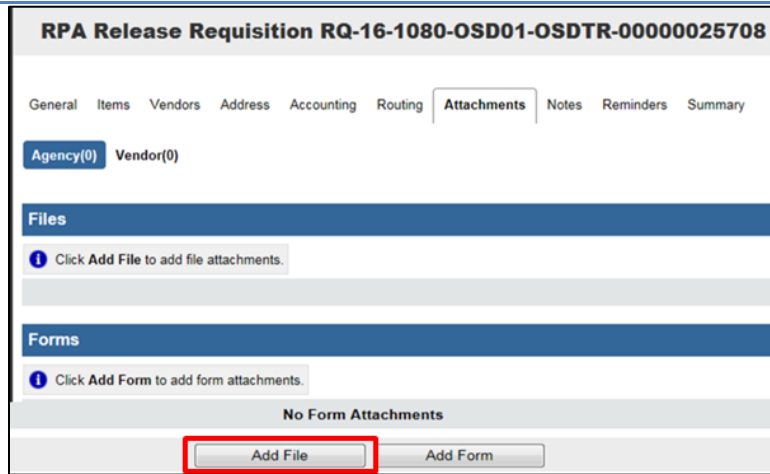
Item #	Links	Print Sequence	Invoice #	Invoice Date (MM/DD/YYYY)	Payment Due Date (MM/DD/YYYY)	Item Description	Quantity	Minimum Order Quantity	Catalog Price/Unit Cost	Net Unit Cost	UCM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	Master Blanket # / Line # PO-16-1080-OSD01-OSDTR-00000025708 / 1Z	1.0	Tire, Goodyear, Auto Radial, Size 245/40R19 93W SL EAGLE SPORT A/S VSBTL, Product Code: 10957366	12345	09/21/2015		1.0	0.0	\$130.94	\$130.94	EA-Each	\$0.00	\$0.00	\$130.94		
Total															\$130.94	

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue Search Items

Step 9: Enter invoice information

- Enter the invoice number as it appears on the vendor's invoice.
- Enter the payment due date as it appears on the vendor's invoice.
- Once complete review the requisition items and invoice information
- Click the **Save & Continue** button
- Next, select the **Attachments** tab.



RPA Release Requisition RQ-16-1080-OSD01-OSDTR-00000025708

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Agency(0) Vendor(0)

Files

Click Add File to add file attachments.

Forms

Click Add Form to add form attachments.

No Form Attachments

Add File Add Form

Step 10: Add attachments

- The **Attachments** Tab opens.
- If any files auto-attach: review, keep or delete as necessary.
- Click the **Add File** button to add a new file such as a scanned copy of the Vendor's invoice.

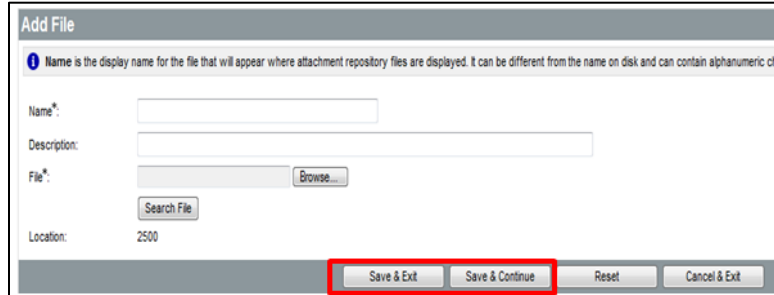
Note: The **Add Form** button is not currently a working function in COMMBUYS.

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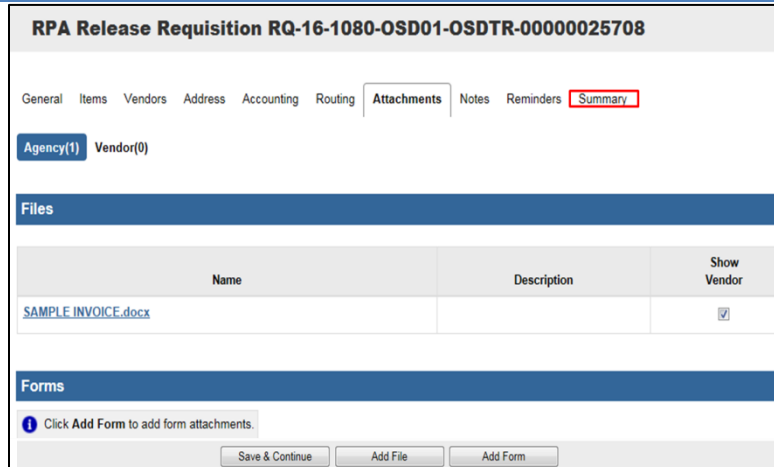
Directions



Step 11: Choose files to attach

1. The **Add File** window opens.
2. To select a file from your computer, click the **Browse** button. This will search for documents from your computer.
3. Select the desired file.
4. Complete the following fields:
 - **Name** – required; but will be populated with the selected file name if left blank
 - **Description** – optional
5. Click **Save & Exit** to go back to the Attachments tab. From there you can add another file or click **Save & Continue** when all files have been added.

Note: Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the Repository, click the **Search File** button and complete the advanced search criteria.



Step 12: Review Attachments

1. The **Attachment** tab redisplay with a list of attached files
2. You can opt to disallow the vendor to view the attachments by unchecking the **Show Vendor** box.
3. Next, select the **Summary** tab.

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RPA Release Requisition RQ-16-1080-OSD01-OSDTR-00000026708 Status: 1R - In Progress

General Items Vendors Address Accounting Routing Attachments(?) Notes Reminders **Summary**

Header Information

Requisition Number:	RQ-16-1080-OSD01-OSDTR-00000026708	Short Description:	Tire	Status:	1R - In Progress
Organization:	Operational Services Division	Location:	OSDTR - Training, Events & Outreach	Required By Date:	
Department:	OSD01 - Operational Services Division	Requisition Type:	RPA Release	Type Code:	
Entered Date:	08/18/2015	Purchaser:	PH SUPPORT	Fiscal Year:	2016
Requestor:	Annemarie Espinola	Contact Phone:	(617)655-1212	Alternate ID:	
Contact:	Annemarie Espinola	Estimated Cost:	\$130.94	Print Format:	Requisition Print
Pcard Enabled:	No				
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				
Ship-to Address:	Sodhan Laxmi 1 Congress Street Suite 114 Boston, MA 02109 US Email: tw@serviceholdings.com Phone: (123)456-7890	Bill-to Address:	Sodhan Laxmi 1 Congress Street Suite 114 Boston, MA 02109 US Email: tw@serviceholdings.com Phone: (123)456-7890		

Special Instructions :

Attachments

Agency Files: [SAMPLE INVOICE.docx](#)

Agency Forms:

Vendor Files:

Vendor Forms:

Item Information

Item # 1 : Tire, Goodyear, Auto Radial, Size 245/40R18 95W SL EAGLE SPORT A/S VSBTL, Product Code 10057396 1R - In Progress

U N S P S C Segment Family: 25.11.23
Tires and tire tubes
25.17.35.04
Automobile or light truck tires
25.17.25.04.0000
Automobile or light truck tires

Blanket Contract # Line # Invoice # Payment Due Date Qty UOM Discount % Total Discount Amt Tax Rate Tax Amount Total Cost

PO 15.1088-OSD01-OSDTR-00000026708 / ZZ 12345 08/21/2015 1.0 EA - Each 0.00% \$0.00 \$0.00 \$130.94

Manufacturer: Make

Account Code Amount

There is no item accounting available for this item.

Recommended Vendor: 216313 - The Goodyear Tire & Rubber Company
Debbie W Fear
200 Innovation Way, D709
Akron, OH 44316-0001
US
Email: tw@serviceholdings.com
Phone: (123)456-7890

Submit for Approval Cancel Requisition Close Requisition Print

Step 12: Review Summary Tab

1. Click the **Summary** Tab to view a summary of the nearly completed requisition.
2. Click **Submit for Approval** at the bottom of the page.
3. Click **OK** in the Dialogue Box
4. Once approved, the RPA Release Requisition immediately becomes **completely received Purchase Order** with an **In-Progress Invoice**.

Other/optional tabs:

- **Routing Tab:** auto-populated, after approval, based on approval workflow
- **Notes Tab:** optional
- **Reminders Tab:** optional

Home Items Documents Vendors

Requisitions >

Bids >

POs >

Receipts >

Invoice >

Quotes >

New

In Progress

Ready for Approval

Ready to Send

Sent

Partial Receipt

Complete Receipt

Approved

Returned

Canceled

Closed

Copyright

Step 13: Locate the completely received Purchase Order

1. From the Navigation Bar, select **Documents > Purchase Orders > Complete Receipt**

